

FOR IMMEDIATE RELEASE

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**SAM ROUMAN, CFP®, CLU, CHFC, AIF® RECEIVES 2019 TWIN CITIES FIVE STAR WEALTH MANAGEMENT AWARD**

Sam Rouman recently received the 2019 Five Star Wealth Management award. Rouman works in BerganKDV's Bloomington office, where he is a wealth advisor and chief planning officer for the firm's wealth management division.

Five Star Professional uses its own proprietary research methodology to name outstanding professionals in the Twin Cities market as award winners. Each award candidate undergoes a thorough research process before being considered for the final list of award winners. This year, more than 3,500 award candidates were considered for the Five Star Wealth Management Award and approximately 20% of the candidates received the award. Candidates are nominated by their peers and clients and are evaluated on ten criteria including: client retention rate, client assets administered, number of client households served and education and professional designations.

"Sam is known for his quest to be a life-long learner," said Wealth Management Solution Leader Matt Cosgriff, "He enjoys being engaged with his peers to continually learn new ideas and stay abreast of industry news and trends to ensure his clients are getting the best possible advice and service."

At BerganKDV, Rouman works with clients on an individual basis so as to get to know their specific needs and determine an appropriate financial plan that matches their goals, oversees the implementation of the plan, and then helps clients monitor how things are going. He is also very involved in many financial planning organizations, including the Twin Cities Chapter of the Society of Financial Services Professionals, the Financial Planning Association of Minnesota, Twin Cities Estate Planning Council, and the Twin Cities Chapter of the American Association of Individual Investors.

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**About BerganKDV:** BerganKDV is a leading professional services firm with a contagious culture; where growth is fostered and making a difference means something. Our values drive our decisions, and our passion is empowering people and creating a wow experience for our clients.

Powered by people who do business the Midwest way, BerganKDV delivers comprehensive business, financial and technology solutions including business planning and consulting, tax, assurance and accounting, technology, wealth management and turnaround management services.

*Investment advisory services and fee-based planning offered through BerganKDV Wealth Management, LLC, an SEC Registered Investment Advisor.*

